

## **TELE-WORKING POLICY AND PROCEDURES**

### **INTRODUCTION**

Tele-work is a management tool that may be used to increase productivity, reduce employee commute trips, and accommodate special needs of employees.

Tele-work is the organization of resources to bring work to the worker instead of the worker to work. Tele-work means working at any location other than the regular work site. The most common tele-work arrangements involve working at home or in an office close to home.

Tele-work is not an entitlement; rather, it is one of several work options used at the Department Director's discretion, such as flexible work schedules and job sharing.

This option allows work arrangements to be tailored to each manager's or work unit's unique requirements. Clackamas County encourages the use of tele-work in situations where it will work to the mutual benefit of employees, the County, and the County's customers.

These guidelines provide a general framework for tele-workers in all County Departments and do not attempt to address the special conditions and needs of all employees.

The intent is to allow County Departments and their managers discretion in designing their own tele-work programs. More specific conditions relating to the employee working away from the principal work site are detailed in the Tele-work Authorization, which shall be negotiated by the employee and supervisor, subject to manager's, department director's or elected official's approval and agreement of DES and Risk Management. The Risk Manager or designate will review the tele-work site for final County approval.

### **PURPOSE**

The purpose of the Clackamas County Tele-work Policy provides a framework for tele-work addressing employee productivity and related management issues.

### **DEFINITIONS**

**Regular Office Hours or Core Office Hours** are the agreed-upon, set of hours during the day when the supervisor and co-workers can always communicate with the tele-worker.

**Tele-work** means working arrangements in which the work place is located at least part time at an alternate location, such as an employee's residence, or a satellite office located closer than the regular office to the employee's residence.

**Equipment.** Refers to the variety of technological tools necessary to complete the tele-work assignment, such as: computer (laptop or personal), fax machine, telephone (cell or land-line) with voice mail, etc.

**Tele-work Application.** The form that an employee fills out to be considered for a tele-work arrangement.

**Tele-work Authorization.** The form signed by the department director or elected official, supervisor, and employee that lists the negotiated conditions of each tele-work arrangement. Final approval requires Risk Management review.

### **EMPLOYEE ELIGIBILITY**

Regular County employees, not on probation or in-training status, are eligible to apply for tele-work. Approval shall be based generally on the requesting employee meeting all of the following criteria:

**Interaction and Scheduling.** A good tele-work situation is when the nature of the work requires minimal face-to-face interaction with supervisor or co-workers, or can be scheduled to permit tele-work.

**Special Materials.** A good tele-work situation is when there is minimal need for specialized material or equipment, or is at least capable of being scheduled to permit tele-work.

**County Work Site Not Crucial.** The employee's job is not dependent upon location of the workplace, and has tasks and deliverables that can be clearly defined and monitored at other than the traditional work site.

**Low Impact on Workgroup.** The employee's absence from the office is not detrimental to the productivity of the work group. An employee, whose job as a team member necessitates the presence of all members for efficient functioning, is an example where tele-work would not be compatible.

**Performance Evaluation.** Performance characteristics of the employee should demonstrate the ability to successfully meet the special working conditions of the tele-work status.

### **TERMS OF EMPLOYMENT**

The tele-worker's salary, benefits, responsibilities, professional standards, and promotional opportunities will not change as a result of the tele-work arrangement.

### **TELE-WORK AUTHORIZATION FORM**

A Tele-work Authorization document based on the needs of the County, the employee's department, workgroup and job will be signed by the employee and supervisor describing the mutually agreed-upon arrangement. The Department Director and DES Director must approve this document.

The Authorization will provide a specific understanding of the arrangement and the joint responsibilities for each party.

## **TRAVEL AND OVERTIME**

Existing rules apply toward leave, hours of work and scheduling work; Fair Labor Standards Act (FLSA) rules on overtime and County travel policies and regulations shall apply to tele-workers.

## **PERFORMANCE EVALUATION**

Performance evaluation requirements shall not change, although the supervisor's method of monitoring and evaluating performance may focus more on results than direct observation. Deadlines, goals and objectives must be clearly communicated.

## **EMPLOYEE COMPLIANCE**

Employees must comply with all County rules, policies, practices and instructions. Failure to do so may result in removal from the tele-work program and/or disciplinary action.

## **EMPLOYEE BARGAINING UNITS**

Employees within a union bargaining unit may be included in the tele-work program unless prohibited by the collective bargaining agreement.

## **WORKERS COMPENSATION**

**Employee Injuries.** The County will have the same responsibility for job-related accidents or injuries to the employee that are caused by a condition within the designated work site that it has at the employee's regular County office, provided the injury occurs in the course and scope of the tele-work duties.

**Family and Visitor Injuries.** The County does not assume responsibility for injury to any persons at the employee's residence or alternate workspace within it.

## **DISABLED WORKER/RETURN TO WORK**

Supervisors and employees may consider tele-working as a flexible workplace arrangement for assisting disabled workers, or in returning to work those employees on medical leave, or injured on the job and on Workers Compensation.

## **COST AND BENEFIT CONSIDERATIONS**

Each tele-worker arrangement should be reviewed for costs and benefits, such as the nature of the job, equipment requirements and expected results.

## **WORK HOURS AND ACCESSIBILITY**

**Work Hours and Scheduling.** The number of hours worked will not change because of tele-work. Work hours will be scheduled and the supervisor must approve any changes in advance.

Also please refer to County Policy regarding work hours, schedules and Fair Labor Standards Act.

**Adequate Time in Office.** The amount of time spent tele-working during a work week may vary according to each job, equipment needs and the individual Tele-work Authorization.

Minimally, the tele-work schedule must allow adequate regular office time for meetings, access to facilities and supplies, and communication with other employees and with customers.

**Accessibility.** Tele-workers will maintain accessibility to their supervisor, co-workers and customers as agreed upon in the Tele-work Authorization. A regular set of daytime hours must be maintained.

**Family Care and Duties.** While tele-work may facilitate employees' working around family responsibilities, it is not intended to be a substitute for family care. Tele-work is not a substitute for child or elder care. Tele-workers shall make arrangements for family care during the agreed-upon work hours. The County reserves the right to request verification of these arrangements.

**Visitors.** The tele-worker shall not entertain visitors during work hours. Notice should be given to friends and neighbors that while working at home, the tele-worker is not available to socialize.

**Overtime and Leave.** Request to work overtime must receive advance approval, and requests for leave shall be reported and/or approved by the supervisor, in a manner consistent with County policy.

**Emergency Excuse From Work.** If an office closure or emergency excuses other employees from working and work can proceed at the alternate work site, tele-workers are not excused from working.

However, an employee may be excused from working for an emergency such as a power failure that affects the alternate work site but not the office, or may be required to report to the regular office.

The immediate supervisor must be notified of the emergency and shall excuse the employee or require attendance at the regular office.

**Short-Term, Occasional and Sporadic Tele-work.** The Department Director (or designee) may authorize occasional and sporadic tele-work for short periods. Typically, these short-term approvals would involve the use of the employee's own equipment or assigned equipment. The Department Director will be responsible to assure that any approval is consistent with the general provisions of the tele-work guidelines. Completion of the Tele-work Authorization document and home worksite inspection is not required for short-term, occasional and sporadic tele-work. (Short-term is defined as no longer than 30 business days.)

**Tele-worker's Privacy.** Only the employee's supervisor or persons authorized by the employee will be provided with a tele-worker's home phone number.

## **COMPUTER EQUIPMENT AND SOFTWARE**

**County Property and Inventory.** Software and/or hardware provided by the County remains the property of the County and shall be returned at the end of the tele-work arrangement.

The tele-worker's work unit will maintain an equipment/software inventory record for County assigned equipment for off-site use.

Products, documents, computer files and other records used and/or developed while telecommuting shall be considered to be the property of the County. Any such items shall be delivered to the custody of the County at its request. Such items are also subject to departmental and divisional policies regarding confidentiality and authorized access.

Restricted access documents and other materials may not be taken out of the regular County office without prior supervisory approval.

**Software.** County-owned software may not be duplicated except as formally authorized. Tele-workers using County software must adhere to the manufacturer's licensing agreements.

The employee is responsible for protecting the integrity of copyrighted software, and following policies, procedures, and practices related to them to the same extent applicable in the regular office.

The employee must take all precautions necessary to avoid contamination of data (for example, by use of unauthorized software that may contain a computer virus).

## **COUNTY COMPUTER SUPPORT**

Support should be provided by the tele-worker's department, within its priorities, to the extent possible based on the availability of staff, funds, support capacity and other resources.

The diverse nature of department missions and the variety of information systems employed make it impossible to guarantee that the County can extend needed information system access to the alternate work location.

Support services may be provided by Information Services Division through an interagency service agreement with the tele-worker's department, by that department's own support staff, by an approved vendor with which the department contracts, or by a combination of these resources. The tele-work department will secure any necessary vendor agreements/contracts.

**Installation.** If the tele-worker requires computer support at the alternate work location, the tele-worker's department, through its selected support provided, should be responsible for installation and configuration of any computer hardware, data communication lines, and software the tele-worker requires to perform work. The tele-worker should use his own computer equipment, but Information Services may require the telecommuter to bring in the PC into the Information Services Department for evaluation configuration and software loading if Information Services is providing support. A minimum configuration standard will be established by Information Services to which all tele-workers' computers must conform.

**Repair.** If County-owned computer equipment is provided at the alternate work location, the tele-worker's department, through its selected support provided, should be responsible for its repair. Repair of non-County owned computer equipment would be the responsibility of the tele-worker unless specifically provided for in the approved tele-work arrangement.

### **VOICE-DATA TELECOMMUNICATIONS**

**General Expenses.** The County will pay telephone services that are deemed necessary for the employee to do the job if specifically approved by the employee's department.

**Long-Distance Expenses.** Tele-workers should use the agreed upon land line, cellular phone, or other approved method of communicating (e.g. Skype or face time) when making long distance, work-related voice communications. Long distance charges incurred using other long distance carriers may be reimbursed as stipulated in the Tele-work Authorization.

### **COUNTY PROPERTY USE AND PROTECTION**

**Office Supplies.** Supplies necessary to complete assigned work at the alternative work site should be obtained during one of the tele-worker's in-office work periods.

**Exclusive Use.** All equipment, software, supplies, or other material purchased or maintained by the County are to be used by the tele-worker and only for County business.

**Equipment Liability.** Clackamas County will be responsible for the repair and maintenance of equipment provided by Clackamas County. The tele-worker is responsible for bringing equipment in need of repair to Technology Services at Clackamas County unless another vendor or contractor approved by Technology Services is used. The employee will be responsible for:

- a) any intentional damage to the equipment
- b) damage resulting from gross negligence while in the employee's possession (i.e., family, friends, neighbors, etc.),
- c) damage resulting from a power surge if no surge protector is used.

The employee is responsible for any damage to his own equipment.

**Care of Property.** The employee has the same responsibility for taking appropriate steps to minimize damage to County property used at the alternate work site as would exist at the regular County office.

**Surge Protection.** Surge protectors will be provided by the County and must be used with any County owned computer equipment. The employee will be responsible for damage resulting from a power surge if no surge protector is used.

### **PERSONAL WORKSPACE EQUIPMENT**

**Purchases.** Purchases of home office furniture or equipment (e.g., desks, file cabinets, answering devices, etc.) is the tele-worker's financial responsibility.

**Maintenance and Repair.** Employees who use their own equipment (not furnished by the County) are responsible for its maintenance and repair.

**Damage or Loss.** The County assumes no obligation in regard to damage or loss to property owned by the employee at the alternate work site.

## **WORKSPACE**

**Adequacy and Safety.** The employee is responsible for establishing and maintaining a designated, adequate workspace at the alternate work site. The employee is responsible for maintaining this space to the same safety and other standards as are applicable at the regular County office. The County, through the Risk/Benefits Division, both to protect the employee and County's interests, shall inspect the workspace for the purpose of ensuring that adequate safety standards are in place prior to tele-work commencing.

**County Visits.** The County will make an on-site visit(s) for inspection of the workspace to ensure that it is sufficient for the equipment, safe from hazards and/or install or retrieve County equipment or property. The employee's supervisor may make visits, or anyone designated by the supervisor to make an inspection during the tele-worker's scheduled work hours.

The County will also make on-site visits to measure the success and productivity of the tele-work arrangement. Visits may be made by the employee's supervisor or anyone designated by the County Administrator, Department Director or Elected Official for the department. On-site visitation will occur during the tele-worker's regular work hours.

## **COSTS**

**Cost Obligations of the Employee.** Tele-workers who have necessary office equipment at the home office are expected to use it.

Individual tax implication, auto/homeowners insurance and incidental residential utility costs are the responsibility of the employee.

**Cost Obligations of the County.** Depending upon the nature of the job and availability of funds, the tele-worker's department may provide a workstation, modem, communications software, job-specific software, and related computer equipment. The County will not purchase computer equipment specifically for telecommuting purposes.

## **ADMINISTRATIVE PROCEDURES**

**Employee/Tele-worker.** The employee shall complete a Tele-work Application and forward it to their immediate supervisor. The employee collaborates with the supervisor to create a mutually suitable Tele-work Authorization, and signs it if approved by the supervisor.

**Supervisor.** The supervisor approves or denies the Tele-work Application form. If denied, the supervisor discusses this decision with the employee. If approved, the supervisor collaborates with the employee to create a mutually suitable Tele-work Authorization.

The supervisor signs the Tele-work Authorization and forwards both the Application and Authorization forms to the department director or elected official for approval.

The supervisor coordinates with Technology Services Department or department-level technical support regarding estimated cost and needs of the tele-worker as well as a time frame for installation.

**The Department Director/Elected Official.** The director/elected official approves/disapproves the Tele-work Application and Tele-work Authorization. This includes authorization of costs of tele-work and processing of orders for necessary equipment. If disapproved, the department director gives the supervisor an explanation. If approved, department director signs both forms and forwards both forms to the Department of Employee Services for completion of the site visit and approval by the Employee Services Director. Reasons for any disapproval will be discussed with the department director or elected official. Copies of the forms will be returned to the department with the original form kept in DES. A copy will be scanned into the employee file.

### **TELE-WORK PROGRAM EVALUATION**

We suggest customer service as the primary consideration when evaluating a program's success. Energy savings and cost effectiveness should also be evaluated. Each tele-work employee and supervisor should develop a list of program objectives and methods to measure program successes that are consistent with the County Business Plan. These objectives and measures should be reviewed and updated periodically to assure the continued success of the tele-work arrangement.

### **INTERNET LINKS**

County Ordinance <http://www.clackamas.us/code/documents/title2.pdf>

**TELE-WORKING APPLICATION**

Please complete this work sheet and submit the completed form to your supervisor

**(PLEASE PRINT CLEARLY)**

Department \_\_\_\_\_ Division \_\_\_\_\_

Employee's Name \_\_\_\_\_

Work Address \_\_\_\_\_

Home Address \_\_\_\_\_

Employee's Classification \_\_\_\_\_

Represented \_\_\_\_\_ Non-Represented \_\_\_\_\_ Bargaining Unit \_\_\_\_\_

Supervisor's Name \_\_\_\_\_

Supervisor's Classification \_\_\_\_\_

Description of Tele-worker Project (how many days a week; tasks). Include why this telecommuting arrangement is being requested:

---

---

---

---

---

---

---

---

Equipment needed for tele-worker:

Computer \_\_\_\_\_ Provided by \_\_\_\_\_

Telephone Line \_\_\_\_\_ Calling Card \_\_\_\_\_ Other \_\_\_\_\_

Please explain how department will fund this project, e.g., reduce space and equipment required in office.

---

---

---



**Tele-worker Authorization** page 2

6. Tele-worker agrees to call the office to obtain messages at least \_\_\_\_\_ times a day while working at home.
  
7. The tele-worker will use the following equipment in the remote work location: Please specify whether equipment is County or tele-worker owned.
  
8. The tele-worker agrees to work at the following location: Please specify designated work area within that location.
  
9. Additional conditions agreed upon by the tele-worker and the supervisor are as follows (attach documents as necessary):

*I have read and understand the County's tele-worker expectations and agree to the conditions detailed above.*

Employee's signature: \_\_\_\_\_ Date: \_\_\_\_\_

Supervisor's signature: \_\_\_\_\_ Date: \_\_\_\_\_

Approved by Division/Department Head:

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Approved by Risk Manager & DES Director

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_